

For calendar year 2018, or tax year beginning 01-01-2018, and ending 12-31-2018

Name of foundation COPELAND FAMILY FOUNDATION INC		A Employer identification number 22-2474056	
Number and street (or P O box number if mail is not delivered to street address) 1183 RANDOLPH AVENUE		Room/suite	B Telephone number (see instructions) (617) 698-5976
City or town, state or province, country, and ZIP or foreign postal code MILTON, MA 02186		C If exemption application is pending, check here ☐	
G Check all that apply ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☒ Amended return ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 37,871,593	J Accounting method ☐ Cash ☒ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)				
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities . . .	797,429	797,429	797,429	
	5a Gross rents	13,200	13,200	13,200	
	b Net rental income or (loss) 13,200				
	6a Net gain or (loss) from sale of assets not on line 10	1,130,861			
	b Gross sales price for all assets on line 6a 10,077,815				
	7 Capital gain net income (from Part IV, line 2) . . .		1,130,861		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	1,941,490	1,941,490	810,629	
	13 Compensation of officers, directors, trustees, etc	378,985			378,985
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	6,005			6,005
	b Accounting fees (attach schedule)	19,900			19,900
	c Other professional fees (attach schedule)	170,795	169,038		1,757
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	78,406	20,614		57,792
	19 Depreciation (attach schedule) and depletion . . .	43,347			
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)	124,843			124,843
	24 Total operating and administrative expenses. Add lines 13 through 23	822,281	189,652		589,282
	25 Contributions, gifts, grants paid	1,025,500			1,025,500
	26 Total expenses and disbursements. Add lines 24 and 25	1,847,781	189,652		1,614,782
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	93,709			
	b Net investment income (if negative, enter -0-)		1,751,838		
				810,629	

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			
		Beginning of year (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing	762,754	946,098	946,106
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	21,866	24,690	19,211
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	34,179,447	31,321,618	31,321,618
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment basis ▶ <u>4,111,508</u> Less accumulated depreciation (attach schedule) ▶ <u>643,218</u>	3,511,631	3,468,290	3,468,284
15	Other assets (describe ▶ _____)	2,144,597	2,116,374	2,116,374	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	40,620,295	37,877,070	37,871,593	
Liabilities	17	Accounts payable and accrued expenses	18,975	19,875	
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)	1		
	23	Total liabilities (add lines 17 through 22)	18,976	19,875	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ☒ and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted	40,601,319	37,857,195	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ☐ and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see instructions)	40,601,319	37,857,195	
31	Total liabilities and net assets/fund balances (see instructions) .	40,620,295	37,877,070		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	40,601,319
2	Enter amount from Part I, line 27a	2	93,709
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	40,695,028
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,837,833
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30 .	6	37,857,195

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a PUBLICALLY TRADED SECURITIES-BBH		P	2000-01-01	2018-06-14
b PUBLICALLY TRADED SECURITIES-BBH		P	2018-01-01	2018-06-14
c PUBLICALLY TRADED SECURITIES-PRW		P	2018-01-01	2018-06-14
d PUBLICALLY TRADED SECURITIES-PRW		P	2000-01-01	2018-06-14
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,403,396		2,645,167	758,229
b 180,324		218,297	-37,973
c 3,532,609		3,668,297	-135,688
d 2,961,486		2,415,193	546,293
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a			758,229
b			-37,973
c			-135,688
d			546,293
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	1,130,861
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	-173,661

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?



Yes



No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2017			
2016			
2015			
2014			
2013			

2 Total of line 1, column (d)	2	
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years	3	
4 Enter the net value of noncharitable-use assets for 2018 from Part X, line 5	4	
5 Multiply line 4 by line 3	5	
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	
7 Add lines 5 and 6	7	
8 Enter qualifying distributions from Part XII, line 4	8	

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b	1	35,037
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	35,037
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	35,037
6	Credits/Payments		
a	2018 estimated tax payments and 2017 overpayment credited to 2018	6a	40,516
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	40,516
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . . ▶	10	5,479
11	Enter the amount of line 10 to be Credited to 2019 estimated tax ▶ 5,479 Refunded ▶	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? (see Instructions for definition). <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ▶ \$ _____ (2) On foundation managers ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MA _____		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2018 or the taxable year beginning in 2018? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule. See instructions.	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement. See instructions.	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ N/A	13	Yes	
14	The books are in care of ▶ MARTHA VERDONE Telephone no ▶ (617) 698-5976			

Located at **▶** 1183 RANDOLPH AVE MILTON MA ZIP+4 **▶** 02186

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐	15		
16	At any time during calendar year 2018, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶	16	Yes	No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions. ☐	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2018? ☐	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2018, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2018? ☐ Yes ☒ No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions). ☐	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2018 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2018). ☐	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2018?	4b		No

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)

		Yes	No
5a	During the year did the foundation pay or incur any amount to		
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No	
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No	
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions.		5b No
	Organizations relying on a current notice regarding disaster assistance check here. 	☐	
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	☐ Yes ☒ No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870		6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No	
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b No
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ No	

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1 List all officers, directors, trustees, foundation managers and their compensation. See instructions				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000. 				

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)***3** Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
PRW ASSOCIATES INC 1 PINE HILL DRIVE QUINCY, MA 02169	INVESTMENT MGMT	80,463
LEAHY CODY & O'DONNELL LLC 63 WINTHROP ST TAUNTON, MA 02780	ACCOUNTING	19,900
CODY CODY & MCCARTHY 1 PINE HILL DR QUINCY, MA 02169	LEGAL	6,005
BROWN BROTHERS HARRIMAN & CO 40 WATER STREET BOSTON, MA 02109	INVESTMENT MGMT	91,865
Total number of others receiving over \$50,000 for professional services. ►		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3 ►	

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities.	1a	32,750,533
b	Average of monthly cash balances.	1b	853,952
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	33,604,485
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	33,604,485
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	504,067
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	33,100,418
6	Minimum investment return. Enter 5% of line 5.	6	1,655,021

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	1,655,021
2a	Tax on investment income for 2018 from Part VI, line 5.	2a	35,037
b	Income tax for 2018 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	35,037
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	1,619,984
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	1,619,984
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	1,619,984

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	1a	1,614,782
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	4	1,614,782
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b. See instructions.	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	1,614,782

Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2017	(c) 2017	(d) 2018
1 Distributable amount for 2018 from Part XI, line 7				1,619,984
2 Undistributed income, if any, as of the end of 2018				
a Enter amount for 2017 only.			259,963	
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2018				
a From 2013.				
b From 2014.				
c From 2015.				
d From 2016.				200,556
e From 2017.				119,022
f Total of lines 3a through e.	319,578			
4 Qualifying distributions for 2018 from Part XII, line 4 ▶ \$ <u>1,614,782</u>				
a Applied to 2017, but not more than line 2a			259,963	
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2018 distributable amount.				1,354,819
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2018 (If an amount appears in column (d), the same amount must be shown in column (a))	265,165			265,165
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	54,413			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions				
e Undistributed income for 2017 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2018 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2019				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).				
8 Excess distributions carryover from 2013 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2019. Subtract lines 7 and 8 from line 6a	54,413			
10 Analysis of line 9				
a Excess from 2014.				
b Excess from 2015.				
c Excess from 2016.				
d Excess from 2017.				54,413
e Excess from 2018.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2018, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2018	(b) 2017	(c) 2016	(d) 2015	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . .					
c "Support" alternative test—enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . .					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:	
a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000) (See section 507(d)(2))	
b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest	
2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:	
Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.	
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed COPELAND FAMILY FOUNDATION INC 1183 RANDOLPH AVENUE MILTON, MA 02186	
b The form in which applications should be submitted and information and materials they should include A LETTER SUMMARIZING THE PROJECT AND SPECIFY THE AMOUNT REQUESTED EVIDENCE OF TAX EXEMPT STATUS 501(C)(3)	
c Any submission deadlines APPLICATIONS ARE ACCEPTED ANY TIME	
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors NO RESTRICTIONS - REPLIES AS TO ACCEPTANCE REJECTION OR DEFERRAL ARE MADE PROMPTLY GEOGRAPHICAL AREA IS A FACTOR BUT NOT THE ONLY DETERMINANT	

Part XV **Supplementary Information** (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a <i>Paid during the year</i> SEE ATTACHED LISTING, MA 02186	NONE	PUBLIC	CHARITABLE	1,025,500
Total			▶ 3a	
b <i>Approved for future payment</i>				
Total			▶ 3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	797,429	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.			16	13,200	
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory					1,130,861
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue a _____					
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal Add columns (b), (d), and (e). .				810,629	1,130,861
13	Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		1,941,490

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

Part XVII

	Yes	No
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1a(1)	No
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1a(2)		No
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1b(1)	No
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1b(2)	No
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1b(3)		No
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1b(4)		No
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1b(5)		No
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1b(6)		No
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1c		No
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value
ue

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations

described in section 501(c) (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule

(a) Name of organization	(b) Type of organization	(c) Description of relationship

Sign Here ***** Signature of officer or trustee	2020-08-07 Date	***** Title
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May the IRS discuss this return with the preparer shown below

(see instr)? ☒ **Yes** ☐ **No**

Paid Preparer Use Only	Maureen F Cody CPA			
	Firm's name ► LEAHY CODY & O'DONNELL LLC			
	Firm's address ► 63 Winthrop Street Taunton, MA 02780			
				Firm's EIN ► 04-2498131
				Phone no (508) 824-6622

Form **990-PF** (2018)

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
MARTHA VERDONE C/O 1183 RANDOLPH AVE MILTON, MA 02186	President 40 00	127,000		
JOHN TOBIN C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	Treasurer 40 00	133,050		
JOYCE TOBIN C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	CLERK 40 00	94,935		
MARY GORMLEY C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	Director 1 00	6,000		
GEORGE P MORAN C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	Director 1 00	6,000		
RAYMOND G PELISSIER C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	Director 1 00	6,000		
RICHARD G WELLS JR C/O 1183 RANDOLPH AVENUE MILTON, MA 02186	Director 1 00	6,000		

TY 2018 Accounting Fees Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	19,900	0	0	19,900

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2018 Depreciation Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 18007218

Software Version: 2018v3.1

Depreciation Schedule

Description of Property	Date Acquired	Cost or Other Basis	Prior Years' Depreciation	Computation Method	Rate / Life (# of years)	Current Year's Depreciation Expense	Net Investment Income	Adjusted Net Income	Cost of Goods Sold Not Included
BUILDING - 1183 RANDOLPH	2001-04-30	300,000	128,843	SL	2 56 %	7,692			
BUILDING IMPROVEMENTS	2003-12-15	154,978	55,967	SL	2 56 %	3,974			
NEW DOORS	2004-09-10	6,526	2,227	SL	2 56 %	167			
BUILDING IMPROVEMENTS-CTC	2004-07-01	467,213	161,719	SL	2 56 %	11,979			
BUILDING IMPROVEMENTS-CTC	2005-07-01	147,898	47,400	SL	2 56 %	3,792			
FIX SHED, PORCH & RAMP	2006-07-07	4,200	3,220	SL	15 0000	280			
ROOF REPAIRS	2006-08-10	19,056	14,499	SL	15 0000	1,270			
WALL FENCE	2006-09-08	14,527	10,971	SL	15 0000	968			
BUILDING IMPROVEMENTS	2007-11-26	52,816	13,766	SL	2 56 %	1,354			
IRRIGATION INSTALLATION	2007-10-25	6,946	1,826	SL	2 56 %	178			
STONE WALL& DRIVEWAY EXPN	2005-11-02	9,250	5,633	SL	20 0000	463			
LAND IMPROVEMENTS - TREES	2009-11-06	11,344	6,150	SL	6 67 %	757			
ROOF	2009-09-30	12,682	2,695	SL	2 56 %	325			
BUILDING IMPROVEMENTS	2010-08-19	161,525	30,549	SL	2 56 %	4,142			
LAND IMPROVEMENTS	2011-07-30	72,742	31,534	SL	6 67 %	4,852			
COMPUTERS	2014-03-08	10,020	8,288	200DB	11 52 %	1,154			

**TY 2018 Land, Etc.
Schedule****Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Auto./Transportation Equip.				3,468,284
Furniture and Fixtures	24,238	24,238		
Machinery and Equipment	20,878	20,872	6	
Buildings	1,350,769	511,010	839,759	
Improvements	93,336	49,389	43,947	
Land	2,584,000		2,584,000	
Miscellaneous	38,287	37,709	578	

TY 2018 Legal Fees Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	6,005	0	0	6,005

TY 2018 Other Assets Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1**Other Assets Schedule**

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
INVESTMENT IN COPELAND PROPERTIES, INC	30,046	29,749	29,749
INVESTMENT IN COPELAND PROPERTIES, LP	2,114,551	2,086,625	2,086,625

TY 2018 Other Expenses Schedule

Name: COPELAND FAMILY FOUNDATION INC

EIN: 22-2474056

Software ID: 18007218

Software Version: 2018v3.1

Other Expenses Schedule

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK SERVICE CHARGES	7			7
COMPUTER ANNUAL MAINTENANCE	8,200			8,200
DUES AND SUBSCRIPTIONS	765			765
INSURANCE	81,711			81,711
MA FORM PC	500			500
MISCELLANEOUS	1,051			1,051
OFFICE EXPENSES	995			995
REPAIRS & MAINTENANCE	25,122			25,122
REPAIRS AND MAINTENANCE	1,500			1,500
UTILITIES	4,992			4,992

TY 2018 Other Professional Fees Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVICE	169,038	169,038	0	0
PAYROLL SERVICE FEES	1,757	0	0	1,757

TY 2018 Taxes Schedule**Name:** COPELAND FAMILY FOUNDATION INC**EIN:** 22-2474056**Software ID:** 18007218**Software Version:** 2018v3.1

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES	35,037			35,037
FOREIGN TAXES	7,471	7,471		
PAYROLL TAXES	26,286	13,143		13,143
REAL ESTATE TAXES	9,612			9,612

COPELAND FAMILY FOUNDATION, Inc.
Grants
January 1, 2018 through December 31, 2018

February 23, 2018

St. Mary's Center for Women and Children 90 Cushing Ave. Dorchester, MA 02125 - general operating support	\$10,000.00
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May 22, 2018

Milton Council on Aging Ten Walnut Street Milton, MA 02186 - landscaping at Senior Center	\$15,000.00
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May 23, 2018

We Are Milton 57 Clifton Rd. Milton, MA 02186 - Milton Music Fest and Fireworks	\$50,000 00
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Milton Council on Aging Ten Walnut Street Milton, MA 02186 - operation of the Council's van	\$25,000.00
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Neponset River Watershed Association 2173 Washington St. Canton, MA 02021 - Storm Water Project	\$20,000.00
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Interfaith Social Services 105 Adams St. Quincy, MA 02170 - general operating support	\$15,000.00
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Milton Art Center 334 Edge Hill Rd. Milton, MA 02186 - general operating support	\$15,000.00
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Boys & Girls Club of Taunton 31 Court St. Taunton, MA 02780 - Summer camp	\$10,000.00
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Camp Sunshine 35 Acadia Rd. Casco, ME 02339 - support sick children and families from Milton	\$10,000.00
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Cardinal Cushing Centers 400 Washington St. Hanover, MA 02339 - general operating support	\$10,000.00
Evergreen Cemetery 43 Appalowsa Circle Tyngsboro, MA - general operating support	\$10,000.00
Father Bill's Mainspring 422 Washington St. Quincy, MA 02169 - general operating support	\$10,000.00
Massachusetts Easter Seals 484 Main St. Worcester, MA 01608 - Camp Agassiz	\$10,000.00
Milton Cemetery 211 Centre St. Milton, MA 02186 - trees	\$10,000.00
W.O.R.K., Inc. 25 Beach St. Dorchester, MA 02186 - general operating support	\$10,000.00
Trustees of Reservation 572 Essex St. Boston 01915-1530 - Support Milton teens on the Neponset River Greenway Summer 2019 Boston Youth Conservation Corps.	\$7,500.00
The Fishing Academy 16 Adair Rd. Brighton, MA 02135 - Scholarship Program	\$6,000.00
Boys & Girls Club of Dorchester 35 Deer St. Dorchester, MA 02125 - general operating support	\$5,000.00
Martha's Vineyard Cerebral Palsy Camp, Inc. P.O. Box 1357 Vineyard Haven, MA 02568 - Camp Jabberwocky	\$5,000.00
Mass Audubon 500 Walk Hill St Mattapan, MA 02126 - Summer Day Camp at Boston Nature Center	\$5,000.00

Road to Responsibility 1831 Ocean St. Marshfield, MA 02050 - general operating support	\$5,000.00
Special Olympics Massachusetts The Yawkey Sports Training Center 512 Forest St. Marlborough, MA 01752 - support for Special Olympic program in Milton	\$5,000.00
S.T.R.I V.E. 651 Washington St. Dorchester, MA 02124 - general operating support	\$5,000.00
Winslow Farm 37 Eddy St. Norton, MA 02766 - general operating support	\$5,000.00
Milton Animal League 181 Governor Stoughton Lane Milton, MA 02186 - Mini Mobil rental	\$3,500.00
Milton High School P.T S.F.O. 25 Gile Rd. Milton, MA 02186 - All Night Graduation Party	\$3,000.00
Casserly House 42 Stellman Rd. Roslindale, MA 02131 - general operating support	\$2,500.00
Friends of the Blue Hills P.O. Box 416 Milton, MA 02186 - general operating support	\$2,500.00
Celebrate Milton! P.O. Box 870074 Milton, MA 02186 - Provide free children's activities at annual celebration	\$2,000.00
Pan Mass Challenge 77 Fourth Ave. Needham, MA 02494	\$1,500.00
Milton National Little League P.O. Box 325 Milton, MA 02186 - Challenger Division	\$1,000.00

Jason Roberts Challenger League 94 Sprague St. Readville. MA 02136 - 2019 Season	\$1,000.00
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D.A.R.E.- Drug Abuse Resistance Education for the following towns:

Town of Milton Police Department 40 Highland St. Milton, MA 02186	\$20,000.00
City of Quincy Police Department One Sea St. Quincy, MA 02169	\$10,000.00
Town of Dover Police Department 3 Walpole St. Dover, MA 02030	\$5,000.00
Town of Hanover Police Department 129 Rockland St. Hanover. MA 02339	\$5,000.00
Town of Hingham Police Department 212 Central St. Hingham, MA 02043	\$5,000.00
Town of Marshfield Police Department 1639 Ocean St. Marshfield, MA 02050	\$5,000.00
Town of Rockland Police Department 490 Market St. Rockland. MA 02370	\$5,000.00
City of Weymouth Police Department 75 Middle St. Weymouth, MA 02189	\$5,000.00
Town of Whitman Police Department P.O Box 348 Whitman. MA 02382	\$5,000.00

Animal Shelters - support of facility for the following organizations:

Animal Rescue League of Boston, Inc. 10 Chandler St. Boston, MA 02116	\$6,000.00
Town of Canton 801 Washington St. Canton. MA 02021	\$6,000.00
Town of Duxbury 878R Tremont St. Duxbury, MA 02332	\$6,000.00

Greyhound Friends, Inc 167 Saddle Hill Rd. Hopkinton, MA 01748	\$6,000.00
Greyhound Pets of America P.O. Box 1495 Middleboro, MA 02346	\$6,000.00
Town of Holbrook 50 North Franklin St. Holbrook, MA 02343	\$6,000.00
Hull Seaside Animal Rescue, Inc. P.O. Box 787 Hull, MA 02045	\$6,000.00
Friends of Marshfield Animal Shelter P.O. Box 52 Marshfield, MA 02050	\$6,000.00
MSPCA 350 S Huntington Ave. Boston, MA 02130	\$6,000.00
Milton Animal League 181 Governor Stoughton Lane Milton, MA 02186	\$6,000.00
Neponset Valley Humane Society, Inc. P.O. Box 544 Norwood, MA 02062	\$6,000.00
City of Quincy One Sea St. Quincy, MA 02169	\$6,000.00
Friends of the Scituate Shelter 780 Chief Justice Hwy. Scituate, MA 02066	\$6,000.00
South Shore Humane Society Box 850157 Braintree, MA 02185	\$6,000.00
Standish Humane Society P.O. Box 634 Duxbury, MA 02331	\$6,000.00
Town of Stoughton 10 Pearl St Stoughton, MA 02072	\$6,000.00
Town of Whitman 20 Essex St. Whitman, MA 02382	\$6,000.00

Food Pantries - supporting operation of food pantries for the following organizations:

St. Vincent dePaul Society 455 Plymouth Ave Abington, MA 02351	\$6,000.00
Braintree Community Food Pantry P.O. Box 850043 Braintree, MA 02184	\$6,000.00
Little Sisters of the Assumption Family Health Service, Inc. 550 Dudley St. Roxbury, MA 02119	\$6,000.00
Hanover Emergency Food Pantry 580 Webster St. Hanover, MA 02339	\$6,000.00
Hingham Interfaith Food Pantry 685 Main St. Hingham, MA 02043	\$6,000.00
Wellspring, Inc. 814 Nantasket Ave. Hull, MA 02045	\$6,000.00
Marshfield Food Pantry P.O. Box 1097 Marshfield, MA 02050	\$6,000.00
Medfield Food Cupboard P.O. Box 172 Medfield, MA 02052	\$6,000.00
Medway Food Pantry 600 Mahan Circle, Medway, MA 02053	\$6,000.00
Millis Ecumenical Food Pantry 142 Exchange St. Millis, MA 02054	\$6,000.00
Milton Food Pantry 158 Blue Hills Pkwy. Milton, MA 02186	\$6,000.00
Norwell Emergency Food Pantry P.O. Box 644 Norwell, MA 02061	\$6,000.00
Ecumenical Community Food Pantry of Norwood, Inc. 150 Chapel St. Norwood, MA 02062	\$6,000.00

Pembroke Food Pantry P.O. Box 295 Pembroke, MA 02059	\$6,000.00
Friendly Food Pantry of Randolph, Inc. P.O. Box 802 Randolph, MA 02368	\$6,000.00
South Shore Community Action Council, Inc. - Plymouth 71 Obery St. Plymouth, MA 02360	\$6,000.00
Scituate Church Pantry, Inc. P.O. Box 120 Scituate, MA 02066	\$6,000.00
Walpole Community Food Pantry P.O. Box 43 Walpole, MA 02081	\$6,000.00
Westwood Food Pantry 60 Nahatan St. Westwood, MA 02190	\$6,000.00
Weymouth Food Pantry P.O. Box 890009 Weymouth, MA 02189	\$6,000.00
Catholic Charities South 686 North Main St. Brockton 02301	\$3,000.00
Blessed Mother Teresa of Calcutta Parish 800 Columbia Rd. Dorchester, MA 02125	\$3,000.00
St. Matthew's Emergency Food Pantry 33 Stanton St. Dorchester, MA 02124	\$3,000.00
My Brother's Keeper P.O. Box 338 Easton 02356-0338	\$3,000.00
Germantown Neighborhood Center 366 Palmer St. Quincy, MA 02169	\$3,000.00
St. John's Food Pantry 21 Gay St. Quincy, MA 02169	\$3,000.00
Quincy Community Action Programs, Inc. One Copeland St. Quincy, MA 02169	\$3,000.00
Quincy Crisis Center P.O. Box 31 Quincy, MA 02170	\$3,000.00

The Pantry Shelf – Quincy 105 Adams St. Quincy, MA 02170	\$3,000.00
St. Vincent dePaul Society 403 Union St. Rockland, MA 02370	\$3,000.00
Rockland Emergency Food Pantry 12 Church St Rockland, MA 02370	\$3,000.00
Stoughton Food Pantry P.O. Box 812 Stoughton, MA 02072	\$3,000.00
St. Vincent dePaul Society 518 Washington St Whitman, MA 02382	\$3,000.00
Whitman Food Pantry P.O. Box 560 Whitman, MA 02382	\$3,000.00

November 7, 2018

Milton Library Foundation 476 Canton Ave. Milton, MA 02186 - annual support	\$50,000.00
Milton Residents Fund 535 Canton Ave. Milton, MA 02186 - support for housing, utilities, and fuel for poor	\$35,000.00
Gavin Foundation 675 East Fourth St. So. Boston, MA 02127 - Gavin House - \$10,000.00 - Cushing House - \$10,000.00	\$20,000.00
Helping Hands 541 Cambridge St Boston, MA 02134 - general operating support	\$20,000.00
National Education for Assistance Dog Services P.O. Box 213 West Boylston, MA 01583 - general operating support	\$20,000.00
Perkins School for the Blind 175 North Beacon St. Watertown, MA 02172 - general operating support	\$20,000 00

American Red Cross 139 Main St Cambridge, MA 02143 - Local relief	\$10,000 00
Beth Israel Deaconess- Milton 199 Reedsdale Rd. Milton, MA 02186 - general operating support	\$10,000.00
Boston Rescue Mission P.O. Box 120069 Boston, MA 02112-0069 - general operating support	\$10,000 00
Cops for Kids with Cancer P.O. Box 850956 Braintree, MA 02185 - general operating support	\$10,000.00
Crohn's & Colitis Foundation of America, Inc. 733 Third Ave, Suite 510 New York, NY 10017 - general operating support	\$10,000.00
D.O.V.E P.O. Box 690267 Quincy, MA 02269 - general operating support	\$10,000.00
The Michael J. Fox Foundation Grand Central Station P.O. Box 4777 New York, NY 10163 - general operating support	\$10,000.00
Friends of the Paragon Carousel P.O. Box 100 Hull, MA 02045 - completion of chariot restoration	\$10,000.00
The Hull Lifesaving Museum, Inc. P.O. Box 221 Hull, MA 02045 - general operating support	\$10,000 00
Morgan Memorial Goodwill Industries, Inc. 1010 Harrison Ave. Boston, MA 02119 - general operating support	\$10,000.00
North Bennet St. School 150 North St. Boston, MA 02109 - scholarships	\$10,000.00

Old Colony Council 2438 Washington St. Canton, MA 02021 - Camp Squanto	\$10,000.00
Old Colony Hospice 321 Manley St. W. Bridgewater, MA 02379 - Palliative Care Consultation Services	\$10,000.00
Partners Home Care 281 Winter St. Suite 240 Waltham, MA 02451 - general operating support	\$10,000.00
Salvation Army 25 Shawmut Rd. Canton, MA 02021 - general operating support	\$10,000.00
Trailside Museum 1904 Canton Ave. Milton, MA 02186 - provides affordable environmental education	\$10,000.00
Zoo New England One Franklin Park Rd. Dorchester, MA 02121 - general operating support	\$10,000.00
Exponent Philanthropy 1720 N. St. NW Washington, DC 20036 - general operating support	\$7,500.00
Talking Information Center, Inc. 130 Enterprise Dr. Randolph, MA 02368 - general operating support	\$7,500.00
Amego, Inc. 33 Perry Ave. Attleboro, MA 02703 - general operating support	\$5,000.00
Forbes House Museum 215 Adams St. Milton, MA 02186 - tree work	\$5,000.00
Journey Forward 5 Shawmut Rd. Canton, MA 02021 - general operating support	\$5,000.00

Lend a Hand – Patriot Ledger P.O. Box 699159 Quincy, MA 02269 - support to the needy over the holidays	\$5,000.00
Magical Moon Farm & Foundation 575 Summer St. Marshfield, MA 02050 - general operating support	\$5,000.00
Milton Food Pantry 158 Blue Hills Parkway Milton, MA 02186 - general operating support	\$5,000.00
New England Center and Home for Veterans P.O. Box 845257 Boston, MA 02284-5257 - general operating support	\$5,000.00
Norwell Visiting Nurse Association and Hospice 120 Longwater Dr. Norwell, MA 02061 - general operating support	\$5,000.00
Save the Harbor/Save the Bay 212 Northern Ave. Suite 304 West Boston, MA 02210 - general operating support	\$5,000.00
City of Quincy 79 West Elm Ave. Quincy, MA 02170 - Friends of Wollaston Beach	\$2,500.00
Smile Train 41 Madison Ave. 28 th floor New York, NY 10010 - general operating support	\$2,500.00

Total: \$ 1,024,500.00